



Communications Market Report: Scotland

Research Document

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Introduction

This is Ofcom's 11th annual review of communications markets in Scotland, offering an overview of the take-up and use of communications services across the nation. The report highlights a number of developments that have taken place in Scotland over the past year, as well as showing differences in consumers' use, take-up and engagement with media and communications services.

Since 2015, consumer satisfaction with broadband has improved in Scotland and overall satisfaction with broadband was higher than in the UK. Our analysis of broadband take-up in Glasgow shows that 88% of adults now have access to the internet through a fixed or mobile connection, on a par with the UK average, despite the lower take-up of fixed broadband. This has happened largely through increased take-up of smartphones, which has increased from 61% to 85% in Glasgow between the 2015 and 2016 reports. This is not reflected across the country, however, where smartphone take-up for Scotland as a whole is 70%, in line with the UK average.

Connectivity is growing in Scotland; 4G coverage in Scotland has increased by 21pp to 92%, although this is the smallest increase across the UK nations. 4G take-up is also lower than the UK average (40% v. 48%) and the lowest of any nation.

Increased connectivity and use of devices are changing the way that people in Scotland engage with traditional media and communications services, as our Digital Day research shows. The use of instant messaging has increased greatly since 2014, up from 28% to 46%, while time spent texting has decreased by 16 minutes. Time spent watching TV has fallen by 13 minutes while there has been a 20 minute increase in time spent watching paid on-demand services.

Despite this, the use of traditional broadcast media in Scotland remains high. People are watching TV for 4 hours each day, and listening to more radio than the previous year – up from 19.9 hours to 21.1 hours, which is in line with the UK average.

People in Scotland are generally satisfied with specific aspects of Royal Mail's service, and they have experienced fewer problems in the past 12 months than the UK average.

Ofcom also commissioned research to investigate how those who are connected feel about it, and what they see as the benefits and disadvantages. A quarter (25%) of adults in Scotland had abstained completely from the internet for some time because they thought they'd been using it too much. Although people in Scotland felt some of the negative effects of being online less than across the UK as a whole, almost three-quarters (72%) said they have felt ignored because the person they were with was using a device.

The information set out in this report does not represent any proposal or conclusion by Ofcom in respect of the current or future definition of markets. Nor does it represent any proposal or conclusion about the assessment of significant market power for the purpose of the Communications Act 2003, the Competition Act 1998 or any other relevant legislation.

The full dataset and charts are available in a searchable resource, which can be found at www.ofcom.org.uk/cmrsotland. Companion reports for the UK and each of the nations can be found at www.ofcom.org.uk/cmr.

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Setting the scene

Key facts about Scotland

Figure	Scotland	UK
Population	5.373 million (mid-2015 estimate)	65.11 million (mid-2015 estimate)
Age profile	Population aged <16: 17.0% Population aged 65+: 18.3%	Population aged <16: 18.8% Population aged 65+: 17.8%
Population density	68 people per square kilometre	269 people per square kilometre
Language	87,503 people aged 3 and over (1.6% of the population) had some Gaelic language ability in 2015.	n/a
Unemployment	6.1% of economically active population, aged 16 and over	5.1% of economically active population, aged 16 and over
Income and expenditure	Weekly household income: £706 Weekly household expenditure: £474.40	Weekly household income: £747 Weekly household expenditure: £531.3

Source: Office for National Statistics: *Population Estimates for UK, England and Wales, Scotland and Northern Ireland, mid-2015*; Office for National Statistics: *Regional Labour Market, June 2016*; Office for National Statistics: *Family Spending 2015 edition*; *National Records of Scotland, Statistical Bulletin, September 2013*; *2011 Census, 2011 Census: Key Results*

A note on our Technology Tracker survey research

We conducted a face-to-face survey of 3,737 respondents aged 16+ in the UK, with 502 interviews conducted in Scotland. Quotas were set and weighting applied to ensure that the sample was representative of the population of Scotland in terms of age, gender, socio-economic group and geographic location. Technology Tracker data in this report are cited as from 2016, with the fieldwork taking place in January and February of this year.

Respondents were defined as urban if they lived in a settlement with a population of 2000 or more and rural if they lived in areas with smaller populations. The survey sample in Scotland has error margins of approximately +/- 3-6% at the 95% confidence level. In urban and rural areas; survey error margins are approximately +/-4-7%.

In addition to the survey data, this report refers to information from a range of other sources, including data provided to Ofcom by stakeholders. Tables summarising the data collected in our survey are published on Ofcom's website.

1 Scotland's communications market

1.1 Introduction

This section sets out a selection of the key facts and figures relating to communications markets across Scotland, comparing and contrasting between nations and highlighting changes that have taken place in the past year.

It also includes the highlights from two pieces of new research; Digital Day, an indepth quantitative diary study looking into people's media and communications activities, and Coping in a Connected Society, which examines how people feel about their use of communications services and devices and what they consider to be the benefits and advantages. We have also repeated our analysis of broadband take-up in Glasgow.

1.2 Fast facts for Scotland

Figure 1.1 Fast facts for Scotland

Nations' fast facts: Half 1 2016 (%) – unless otherwise stated, figures relate to household take-up

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK rural	Scotland urban	Scotland rural
Digital TV take-up	96	96	98	97	98	96	97	98	97
Pay-digital TV	61	59	69 ⁺ +11	68 ⁺	71 ⁺ +8	62 ⁺ +3	54 ⁻	74 ⁺ +16	47 ⁻ -13
Freeview-only TV	29	30	25 ⁻ -10	22 ⁻	23 ⁻	28 ⁻	35 ⁺	21 ⁻ -14	45 ⁺ +11
Smart TV take-up (among TV homes)	28 +7	29 +8	21 ⁻	33 +16	18 ⁻	27 +7	32 +9	21	25 +10
HDTV service (among those with an HDTV)	79 +4	79 +4	79	77 +8	80	80 +6	75	82 ⁺	64 ⁻
DAB ownership (among radio listeners) ¹	50 +7	52 +8	36 ⁻	50	25 ⁻	49 +7	53	34 ⁻	45 ⁺ +10
Catch-up TV/ film viewing online/ on-demand (via any device, among those who use the internet)	58	59	60	59	44 ⁻	58	60	62 ⁺	46 ⁻ -17
Total internet access at home (via any device)	86	87	84	84	83	86	87	86 ⁺ +7	78 ⁻
Broadband take-up (at home)	81	81	79	79	78 +6	80 ⁻	85 ⁺	81 ⁺ +8	70 ⁻
Use mobile to access internet	66 +5	66 +4	63	61	69 +9	66 ⁺ +4	61 ⁻	64	59
Mobile phone take-up (personal use)	93	94	91	91	92	93	94	91	91
Smartphone take-up (personal use)	71 +5	71 +4	70	65 ⁻	72 +9	71 +4	68 +9	72	63

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK rural	Scotland urban	Scotland rural
4G service take-up (among smartphone owners)	67 +22	68 +23	57 ⁻	68 +32	77 ⁺ +37	69 ⁺ +23	55 ⁻ +20	59	50
Fixed landline take-up	86 +2	86	86	85	86	85 ⁻	92 ⁺	87	84
Desktop PC take-up	31 -3	32 -5	23 ⁻	33	17 ⁻ -11	30 ⁻ -4	36 ⁺	22	26
Laptop take-up	64	65	60	61	56 ⁻	64	64	62 ⁺	51 ⁻
Tablet computer take-up	59 +5	59 +5	56	67 ⁺	60	58 ⁻ +4	64 ⁺ +9	56	54
E-reader take-up (personal use)	18	19	15	22	15	18 ⁻	25 ⁺	13 ⁻	21 ⁺
Households taking bundles	68 +5	68 +4	69 +8	67	64	67 +4	72	71 ⁺ +9	59 ⁻
Fixed telephony availability	100	100	100	100	100				
Fixed broadband availability ²	99.98	100	99.86	100	100				
LLU ADSL broadband availability ³	95	96	90	93	90				
2G mobile availability ⁴	99.6	99.7	99.1	98.4	98.8				
3G mobile availability ⁵	99.6	99.8	97.9	98.6	99.4				
4G mobile availability ⁶	97.8	98.8	92.0	90.1	99.3				
DTT availability ⁷	98.5	98.6	98.7	97.8	97.4				
TV consumption (minutes per day) ⁸	216	219 **	240	250	225				
Radio consumption (minutes per day)	183	183	181	190	173				

Key: ⁺ Figure is significantly higher for nation than UK average or significantly higher for nation's urban/ rural than for nation's rural/ urban; ⁻ Figure is significantly lower for nation than UK average or significantly lower for nation's urban/ rural than for nation's rural/ urban; ^{+xx} Figures have risen significantly by xx percentage points since H1 2015; ^{-xx} Figures have decreased significantly by xx percentage points since H1 2015;

Source: Ofcom Technology Tracker H1 2016, BARB, RAJAR, industry data

Base: All adults aged 16+ (n = 3737 UK, 2239 England, 502 Scotland, 507 Northern Ireland, 489 Wales, 2711 UK urban, 1026 UK rural, 1958 England urban, 281 England rural, 251 Scotland urban, 251 Scotland rural, 240 Wales urban, 249 Wales rural, 262 Northern Ireland urban, 245 Northern Ireland rural)

1. DAB ownership in the nations and UK as reported here is sourced from Ofcom research. The UK CMR uses RAJAR data for DAB ownership

2. Proportion of premises connected to an ADSL-enabled BT local exchange based on BT data, December 2015

3. Proportion of premises connected to an LLU-enabled BT local exchange based on BT data, December 2015

4. Proportion of premises with outdoor 2G mobile coverage from at least one operator, May 2016

5. Proportion of premises with outdoor 3G mobile coverage from at least one operator, May 2016

6. Proportion of premises with outdoor 4G mobile coverage from at least one operator, May 2016

7. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom).

8. Based on calendar year 2015. **This figure reflects the average across the English regions with the highest in Border (243) and the lowest in London (197) respectively.

1.3 The Digital Day in Scotland

Summary

Media and communications are a key part of our daily lives and we spend more time using them than we do sleeping. The amount of time that we spend using media and communications overall has changed little since 2014, but there have been some changes in the respective amounts of time that people in Scotland are devoting to different services.

People in Scotland are spending less time watching live TV as well as recorded TV; in contrast, viewing of paid on-demand content has grown.

Watching TV or films on a TV set is a core part of their evening - between 8pm and 10pm each day around nine in ten adults in Scotland are doing this. However, the amount of time spent watching live TV has fallen by 13 minutes, and the amount of time watching recorded TV has declined by 20 minutes. To some extent, this may have been replaced by viewing of paid on-demand content such as Netflix or Amazon Instant Video - people in Scotland are now spending 20 more minutes per day than in 2014 doing this.

Watching live TV still takes the lion's share of our time spent on media and communications, and this is even more the case in Scotland; people there are more likely than in the UK as a whole to rate live TV as their most important media activity. In an average week 94% of people in Scotland watch live TV, while 20% watch paid on-demand content.

The amount of time spent texting has fallen, while the number of people using instant messaging services has increased. Despite an increase in communicating online, traditional methods of communication are still valued - people in Scotland rate phone calls as their most important communications activity.

Background and methodology

This section provides an overview of the core results from our 2016 Digital Day study, drawing comparisons with data from when the study was last conducted in 2014. Further data are also available to access online via the dedicated website - <http://stakeholders.ofcom.org.uk/market-data-research/other/cross-media/digital-day/2016/>

Although Ofcom makes use of a wide range of industry research to understand how people consume broadcast media and online content, they generally provide limited insight into how people use all media and communications services and devices together, and how they form a central part of a consumer's day.

In Q1 2016, we conducted an in-depth quantitative diary study on UK adults' and children's¹ total media and communications activities to provide an overview of the role of media and communications in people's lives. The study was last conducted two years earlier, in 2014, so one of the primary aims was to gauge how things had changed since then. The study was therefore designed to remain as consistent as possible in terms of methodology (with some necessary tweaks and improvements).

¹ Within this report we focus on the data from the adults' diaries only.

The research provides a snapshot of media and communications behaviour over a seven-day period, exploring when and how people use services and devices throughout the day, covering both personal and business use, in- and out-of-home use.

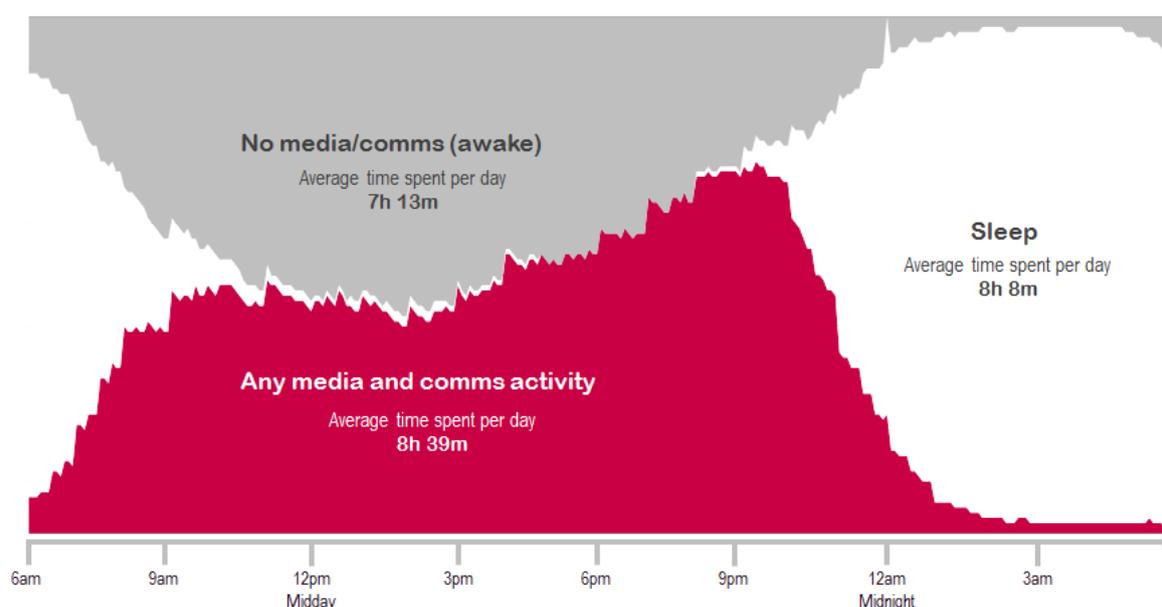
A comprehensive description of the methodology is available in the technical appendix. This includes all questionnaire material, sample information and analysis definitions -

http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/technical_appendix.pdf.

On an average day, adults in Scotland spend more time using media or communication services than they do sleeping

Adults in Scotland spend the majority of their waking hours engaged in media and or communications activity (8h 39m). The actual time spent on media and communications per day is relatively consistent across the UK nations.

Figure 1.2 Media and communications versus non-media and communications activity, by time of day



Source: Ofcom Digital Day 2016

Base: Adults aged 16+ in Scotland (190)

Through multi-tasking, adults in Scotland squeeze 10h 48m of media and communications activity into 8h 39m on a typical day

People consume media in different ways, either focusing solely on the task in hand (categorised as solus activity), or doing two or more things at once, such as watching television and communicating with friends over instant messenger (media multi-tasking). Our research showed that adults in Scotland typically squeeze 10h 48m worth of total media activity into 8 hours 39m of actual time. Among adults in Scotland, since 2014, there has been a 52m decrease in the total time spent on media and communications and a 27m decrease in actual time spent.

Figure 1.3 Average daily media and communications time, by nation



Source: Ofcom Digital Day 2016

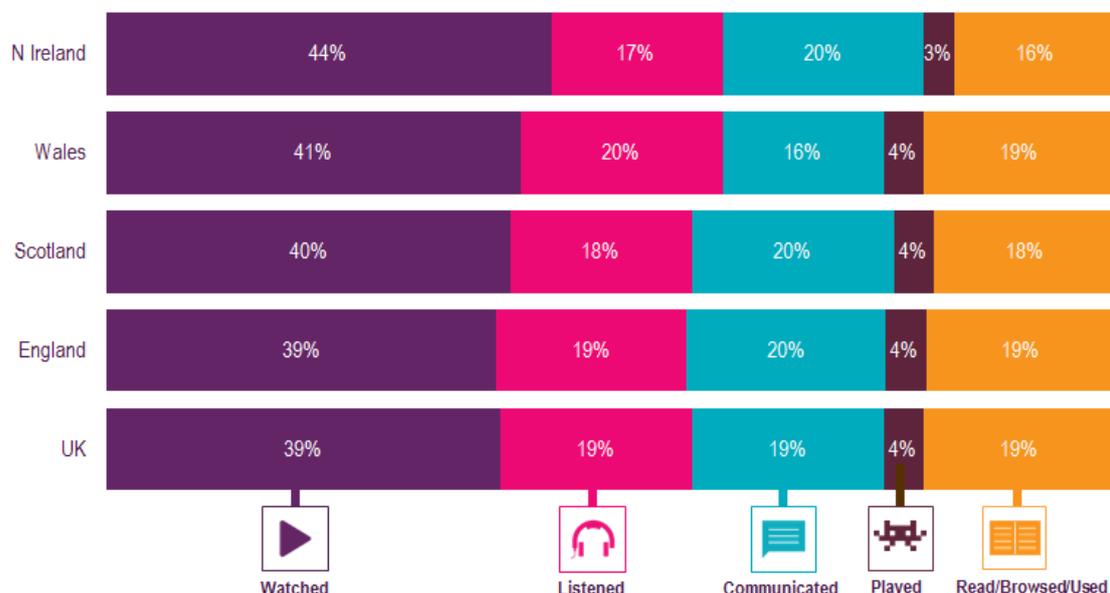
Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N. Ireland (155)

Among adults in Scotland, two-fifths of media and communications time is spent watching content

Watching content such as TV programmes, films or short video clips, accounts for 40% of the total time spent on media and communications by adults in Scotland. This consists mainly of live TV, which makes up 28% of the total media and communications time.

The proportions of this time spent on the five broad activity types (watching, listening, communication, playing and reading/ browsing/ using) is consistent across the nations, and there have been no significant changes since 2014.

Figure 1.4 Proportion of time attributed to activity types, by nation



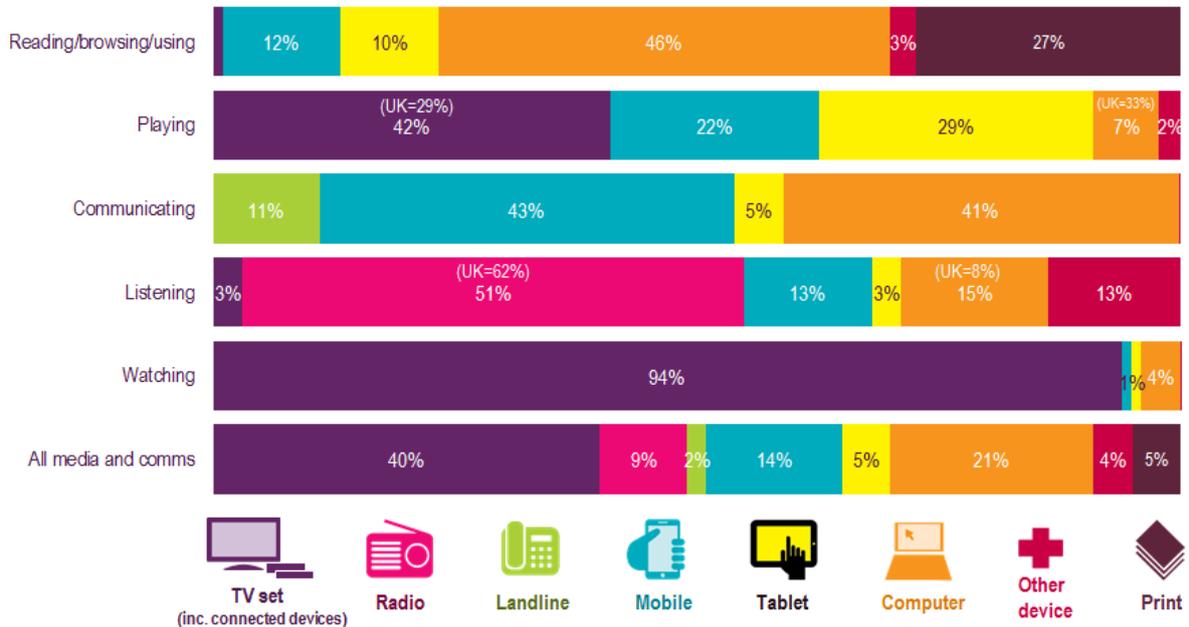
Source: Ofcom Digital Day 2016

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N Ireland (155)

Adults in Scotland spend a lower proportion of their listening time using a radio set than the UK as a whole

Adults in Scotland spend proportionally more time on their TV than on any other device; this is consistent across the nations. When we break this down by type of activity, we can see that for listening activities, adults in Scotland are using radio sets less than the UK as a whole, and computers more. And adults in Scotland are more likely to use a TV set (predominantly with a games console) for playing video games, and less likely to use a computer, than the UK as a whole.

Figure 1.5 Proportion of time attributed to devices, by activity type



Source: Ofcom Digital Day 2016
 Base: Adults aged 16+ in Scotland (190)

The proportion of time spent on activity types among adults in Scotland is in line with the UK as a whole; a quarter (28%) of media and communications time is spent watching live TV and 13% of listening time is spent listening to radio on a radio set.

Figure 1.6 Proportion of time attributed to activity types, by nation



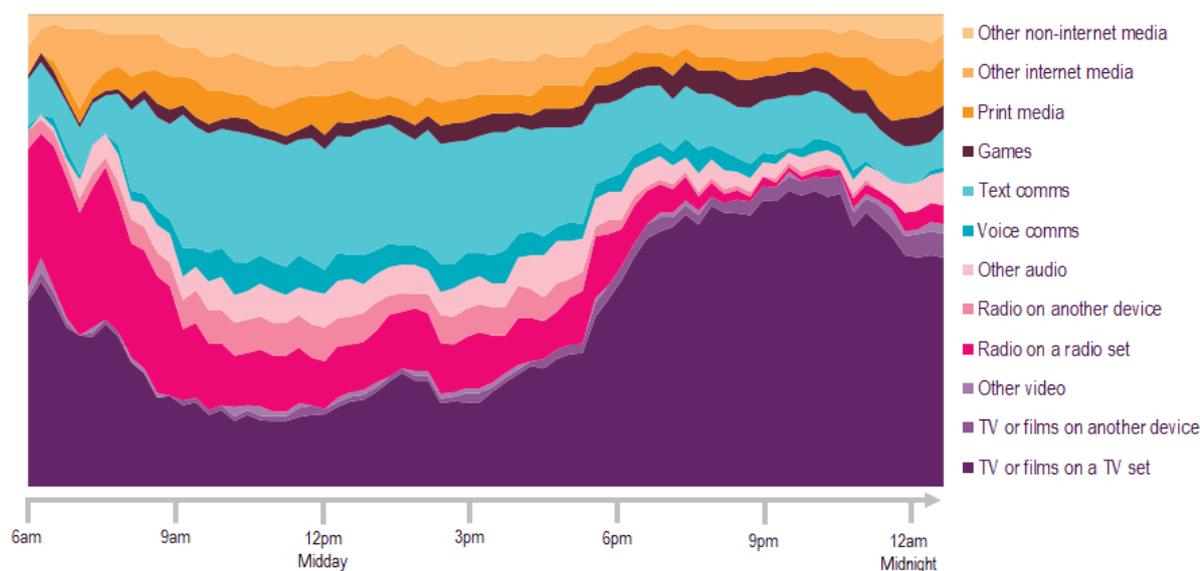
Source: Ofcom Digital Day 2016

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N. Ireland (155)

Watching TV or films on a TV set is the most popular activity in the evening

Looking at the proportion of all media and communications activity participated in, by time of day (across a week), among all adults in Scotland, watching TV or films on a TV set² takes up 62% of this activity between 9:15 and 10pm, consistent with the share for this time period in 2014 and also in line with the UK average (59%).

Figure 1.7 Proportion of media and communications, by time of day



Source: Ofcom Digital Day 2016

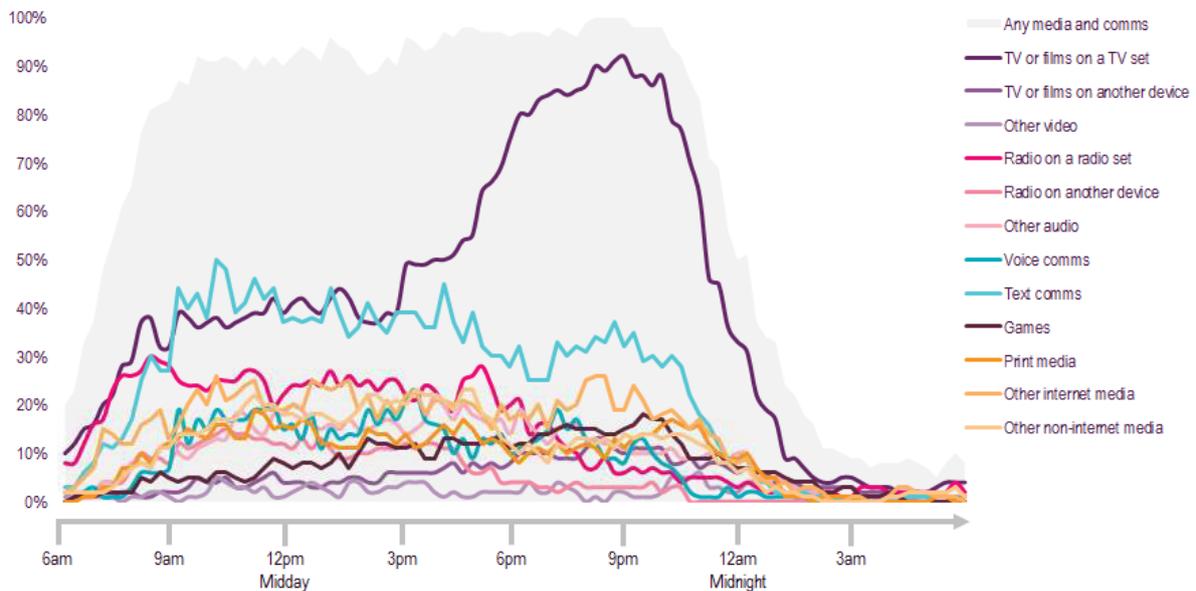
Base: Adults aged 16+ in Scotland (190)

The popularity of TV in the evening period is reflected in its reach across the day. Around nine in ten adults in Scotland watch TV or films on a TV set between 8pm and 10pm at any

² Watching TV includes, watching TV and films via live TV, recorded TV ,on-demand TV (paid or free) and DVD/Blueray

point during the week. This compares to a peak of 50% for text communications, which is slightly higher than TV from 9am to midday, but is increasingly lower in comparison thereafter.

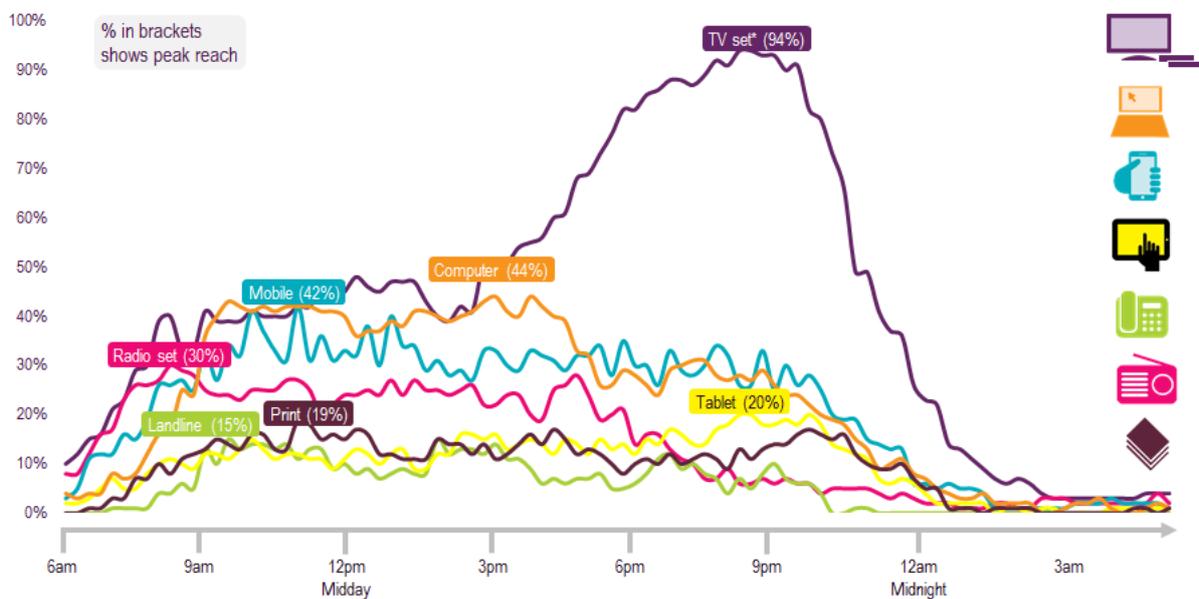
Figure 1.8 Weekly reach of grouped activities, by time of day



Source: Ofcom Digital Day 2016
Base: Adults aged 16+ in Scotland (190)

The patterns shown above for TV and radio content across the day are clearly mirrored by the weekly reach of the primary associated devices, i.e. the TV and radio set. Radio set use during the morning is lower in Scotland than in the other nations.

Figure 1.9 Weekly reach of devices, by time of day

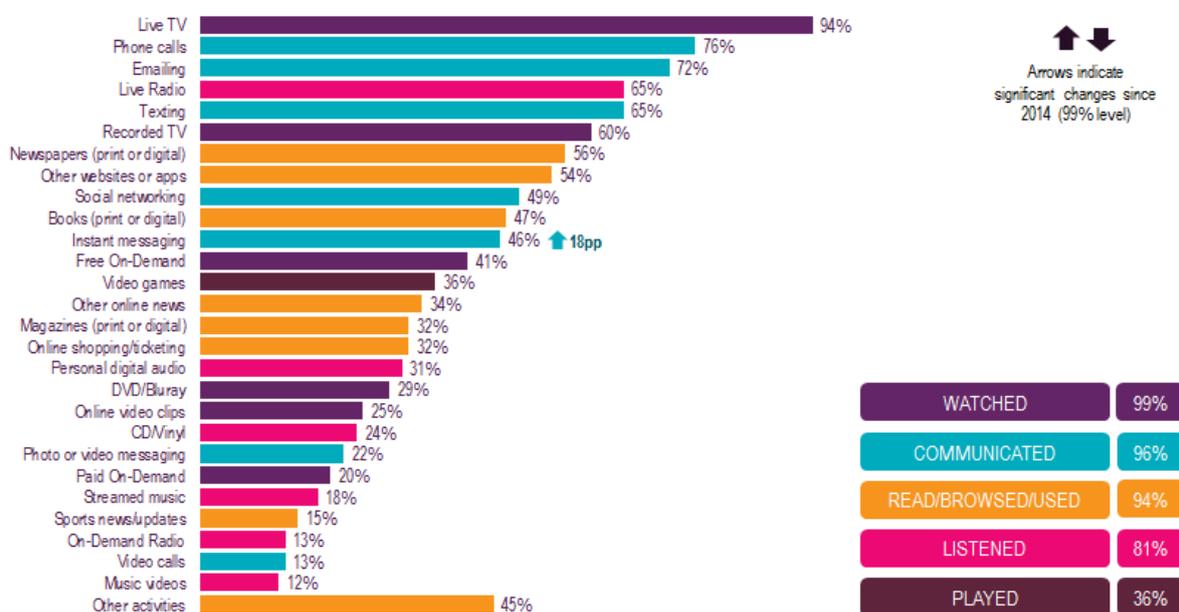


Source: Ofcom Digital Day 2016
Base: Adults aged 16+ in Scotland (190)

In Scotland, use of instant messaging has increased since 2014

More than nine in ten adults (94%) watched any live TV over the week, while the next most popular activity was taking part in phone calls (76%). Instant messaging was the only activity that showed a significant increase since 2014, up by 18pp to 46%.

Figure 1.10 Weekly reach of media and communications activities



Source: Ofcom Digital Day 2016

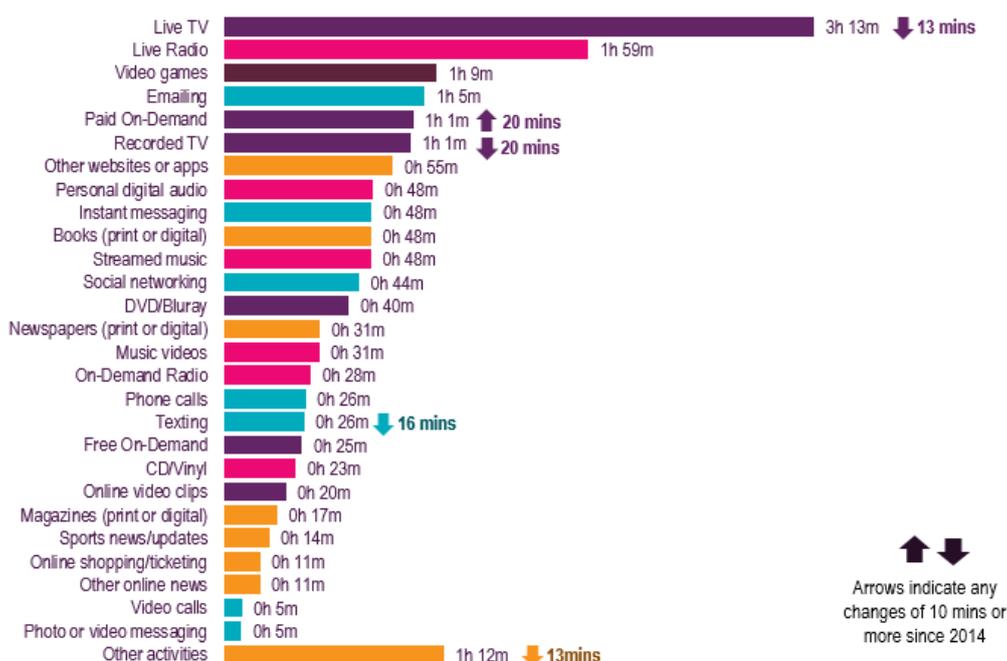
Base: Adults aged 16+ in Scotland (190)

Adults in Scotland now spend less time watching live and recorded TV and more time watching paid on-demand content than in 2014

Among those who watched live TV at all, the average time spent doing this per day has decreased by 13 minutes since 2014; this may in part be attributable to the 20-minute increase in watching paid on-demand content.

An additional three activities showed a decrease since 2014: watching recorded TV (down by 20 minutes), texting (down by 16 minutes) and video calling (down by 23 minutes).

Figure 1.11 Average time spent on activities per day



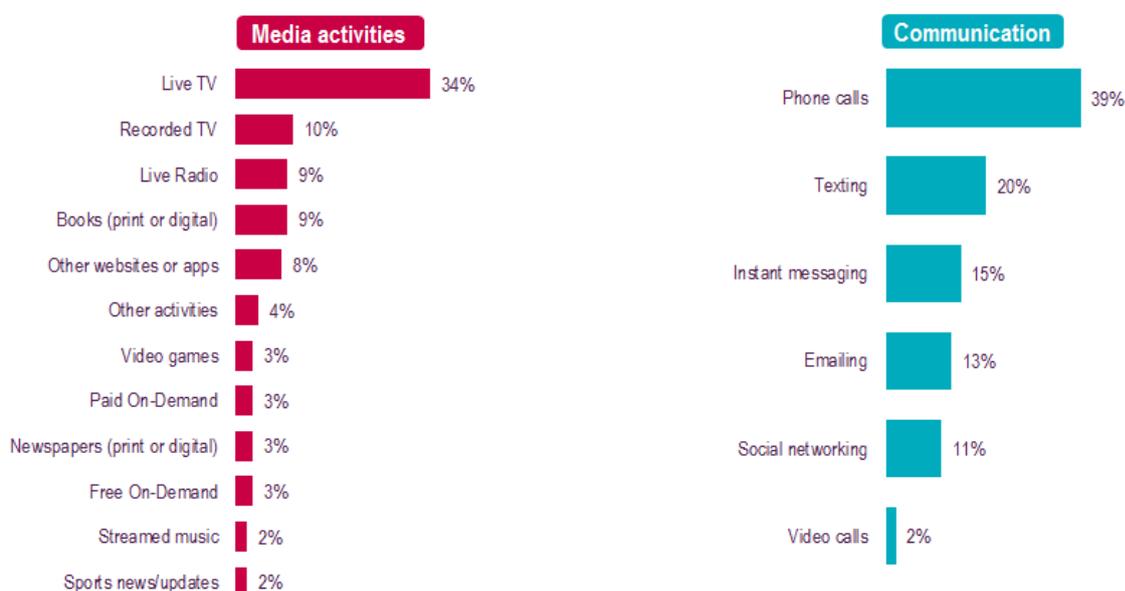
Source: Ofcom Digital Day 2016
Base: Adults aged 16+ in Scotland (190)

Live TV has more importance in Scotland than in the UK as a whole

Respondents who completed the diary were asked (as part of the follow-up survey) which media activity, and which communications method, they considered most important to them personally.

More than a third (34%) of adults in Scotland said that live TV was their most important media activity; this is higher than the UK average (27%). Two-fifths (39%) cited phone calls as their most important communications method, in line with the UK average.

Figure 1.12 Media and communications activities cited as most important



Source: Ofcom Digital Day 2016
Base: Adults aged 16+ in Scotland (190)

1.4 Coping in a connected society

Summary

As we've seen in the Digital Day research in section 1.3, people in Scotland are spending more time using media and communications than sleeping. With an increase in fixed broadband take-up, from 71% to 78% of households between 2015 and 2016, and six in ten people in Scotland able to access the internet on a mobile phone in 2016, people in Scotland increasingly have the connections and the devices they need to get online.

Ofcom commissioned research to investigate how people feel about being connected and what they see as the benefits and disadvantages. The internet is broadening people's horizons and making communications with friends and family easier. But using connected devices, like smartphones or tablets, can get in the way of face-to-face interactions. Almost three-quarters (72%) of people have felt ignored because the person they were with was using a device. And there's a risk of collisions too – nearly seven in ten (67%) people in Scotland have had someone bump into them because the other person was engrossed in their phone.

People don't want to put their devices down, and some are spending more time online than they planned – when they do, it is sleeping and housework that are neglected.

Six out of ten people see themselves as 'hooked' on their connected device. A minority (11%) say that they feel nervous or anxious when they are offline, and one in five (20%) feel nervous without their mobile. But if people in Scotland did decide to take a break from being online, they consider that they'd be better at coping with this than those in the UK as a whole. Some people in Scotland have given themselves a 'digital detox'; a quarter (25%) had abstained completely from the internet for some time because they thought they'd been using it too much.

People in Scotland are embracing the online world

Connectivity is broadening people's horizons; three-quarters (76%) of internet users³ in Scotland say that being online means they can do things that they would previously have been unable to do, and six in ten (58%) internet users say that they would know a lot less about the world if they did not have access to the internet.

People in Scotland are making more use of being online. Just over eight in ten (81%) internet users in Scotland say that the internet has made their life easier, saving time and effort with services like banking and shopping. It also helps people stay informed: 81% of internet users say that being connected helps to keep them up to date with news and current affairs.

As well as people making more use of being online, they are also becoming more used to being online. Fifty per cent of internet users in Scotland agreed that if they couldn't access the internet they would feel out of touch, and just over a third (36%) wouldn't know where to find information if they couldn't get online.

But not everyone feels the same about the time they spend online

The relationship people in Scotland have with the internet is not all plain surfing. Many are recognising that it can have a negative effect on their work and home lives.

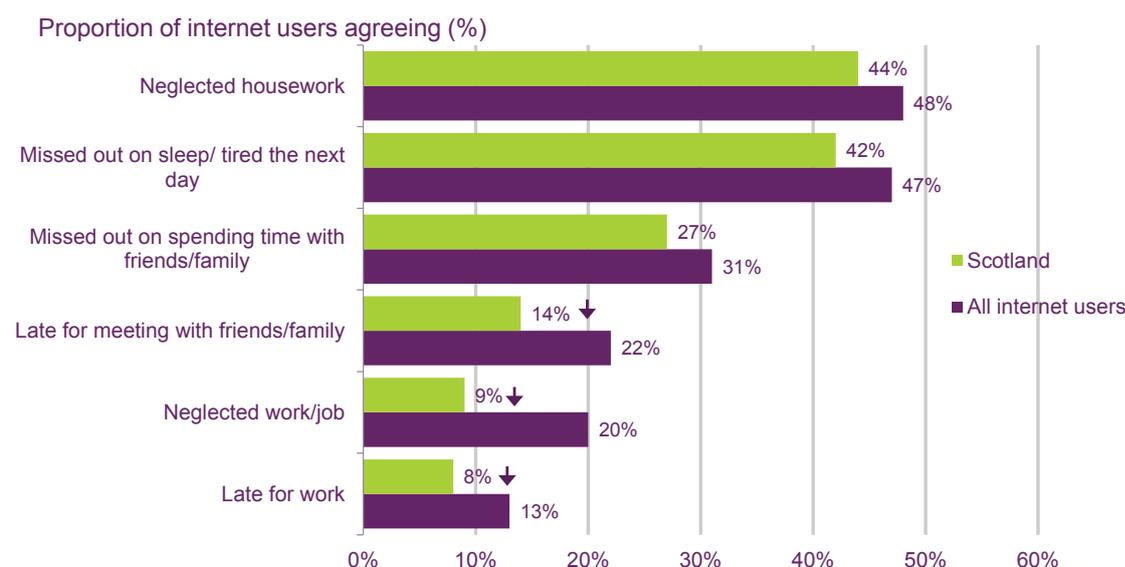
³ Internet users are defined as those who have been online within the last month

Although just over a third (35%) of internet users in Scotland say that they can work more flexibly because of the internet, 15% feel as though they're always at work, as a result of this constant connectivity.

About one in six (17%) feel guilty about the amount of time they spend online. Almost two in five (37%) of all internet users in Scotland admit to spending longer than they intend to in browsing social media, and more than half (53%) spend longer than they intend to just generally browsing the web. When people in Scotland do spend more time than intended online, housework and sleeping are the activities that are neglected, with 44% of regular internet users leaving the housework and 42% losing sleep.

People in Scotland felt some of the negative effects of being online to a lesser extent than those in the UK as a whole; they were less likely to have been late for meetings with friends or family, neglected their job or been late for work, as Figure 1.13 shows.

Figure 1.13 Negative effects of too much time online



Source: Ofcom research, 2016

Base: All going online at least once a month (UK: 1,861; Scotland: 170)

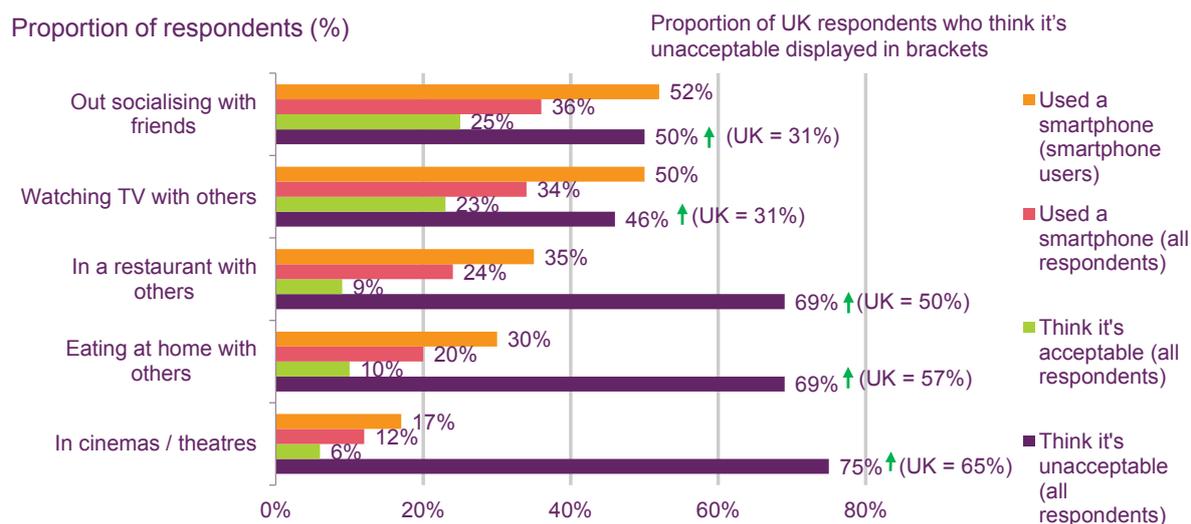
Q.D7 Have any of these parts of your work or personal life ever been negatively affected by spending too much time online?

Although using smartphones and tablets is disruptive to conversation, people still do it

People in Scotland are more likely to keep in touch with their friends and family in person (40%), than they are to use electronic communication such as text messaging (23%), email (22%) or instant messaging (8%). Three in ten (30%) use phone calls to keep in touch with friends and family.

Half (50%) of internet users report that face-to-face interactions are often interrupted by the use of connected devices. Despite this, many people are still willing to use electronic devices in company – watching TV with friends, in a restaurant with other people or having dinner at home, or even at the cinema or theatre, as shown in Figure 1.14. Three-quarters (75%) of smartphone users admitted to using their smartphone in at least one social situation. However, compared with the UK as a whole, more adults in Scotland felt that the use of a device in each of these situations was unacceptable.

Figure 1.14 Use and acceptability of using a smartphone in social situations



Source: Ofcom research, 2016

Base: All (Scotland: 192), smartphone users (125)

Q: For each of the following situations, please indicate if you have personally used and/or have been with others when they have used a smartphone or tablet on each occasion? And for each occasion, could you indicate the extent to which you think using a smartphone at this time is acceptable?

Note: arrows represent significant difference to the UK as a whole

Almost three-quarters of people in Scotland feel ignored while others are using their devices

Considering the widespread use of devices, often in social situations, it's no surprise that 72% of people in Scotland report feeling ignored because another person was engrossed in their phone or tablet. A third (32%) said they experienced this at least once a week and 10% had felt it on a daily basis.

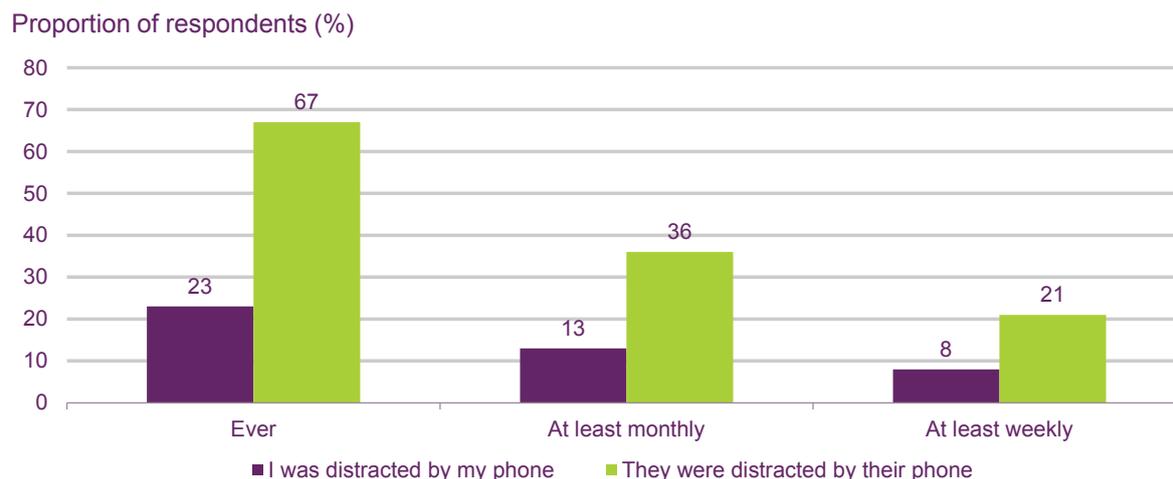
Some people are using their devices to communicate with people while they are in the same place as them: almost a fifth (19%) of people in Scotland had done this. At home, at a friend's house and in a bar or restaurant are the places where people are most likely to communicate electronically with others who are physically present.

Some people can't put their devices down ...

Six in ten (60%) people see themselves as 'hooked' on their device, and one in five (20%) would feel nervous without their mobile. But compared to the UK overall (25%), a greater proportion of adults in Scotland (64%) denied feeling anxious when they did not have their mobile phone with them.

Another effect of attachment to the mobile phone is the risk of collision. Nearly seven in ten (67%) people in Scotland have been bumped into in the street by someone engrossed in their phone or tablet. But less than a quarter (23%) admit to bumping into someone else because they were too busy with their device. This is lower than across the UK as a whole (33%).

Figure 1.15 Distracted by a phone: bumpers, bumpees and the frequency of collision



Source: Ofcom research, 2016

Base: All (Scotland: 192), all phone users (Scotland: 158)

Q: How often, if ever, do people bump into you while walking on the street because they are too busy looking at their phone? Q: How often, if ever, do you bump into people or anything else while walking on the street because you are too busy looking at your phone?

...although some have tried to disconnect

In a bid to strike a healthier tech-life balance, some people in Scotland have given themselves a ‘digital detox’ – purposefully going without the internet for a period of time. A quarter (25%) had abstained completely from the internet for a time because they thought they had been using it too much. Their feelings during the period without the internet were more positive than negative; they felt liberated and less distracted. The majority (80%) had reduced at least one activity because they felt they were spending too much time online; this was a lower proportion than across the UK as a whole (88%). A fifth had made a conscious effort to visit physical shops rather than shopping online, 19% had reduced the time they spent on social media and seven in ten parents had imposed rules to limit their children’s time online.

When thinking about whether they would be able to cut down, or take a break from being online, people in Scotland were more likely than those in the UK as a whole to feel that they would be able to cope with a ‘digital detox’. In fact, compared to the UK, a greater proportion of people in Scotland thought that they would be able to cope *very easily* – and would perhaps look forward to spending more time communicating face-to-face with friends without feeling ignored.

1.5 Analysis of fixed and mobile broadband take-up in Glasgow

Introduction

In previous *Communications Market Reports*, we highlighted that broadband take-up was particularly low in the Glasgow area when compared to the rest of Scotland and the UK. In 2011 and 2013, home broadband take-up in Glasgow was 50%. This increased to 63% in 2014 and remained broadly the same in 2015. When we include internet access through a mobile device, this brings the figure to 66% of households in Glasgow with internet access in 2014, rising to 75% in 2015.

We have repeated this analysis, finding that in the year ending March 2016, 69% of adults in Glasgow have home internet access, with 88% having access through fixed broadband or through a mobile device. This is now in line with the UK due to internet access through mobiles making a substantial contribution to the total internet access in Glasgow.

Methodology

The British Population Survey (BPS) asks consumers in Great Britain about internet and fixed broadband, and comprises around 2,000 face-to-face, in-home interviews with adults (aged 15+) weekly. The large number of interviews allows detailed analysis by region and sub-demographics. Interviews were conducted between April 2015 and March 2016. The analysis was undertaken on the city of Glasgow⁴. In total, data from 250 Glasgow respondents were analysed⁵.

The BPS is designed to monitor the UK population at a regional level, but not to look at relatively small areas such as the City of Glasgow. Therefore, the respondents' profile may shift from year to year. From analysis of Ofcom's *Technology Tracker*, we know that a respondent's age, socio-economic status and gender all influence how likely they are to have broadband in the home.

This year's sample profile was different to previous years', particularly with regard to socio-economic status and gender. To ensure comparability, we adjusted to account for this difference. This change in sample profile this year towards more affluent respondents, and the smaller sample size in 2016, means this analysis should be viewed with some caution.

Over eight in ten homes in Glasgow have access to the internet via fixed broadband or mobile devices

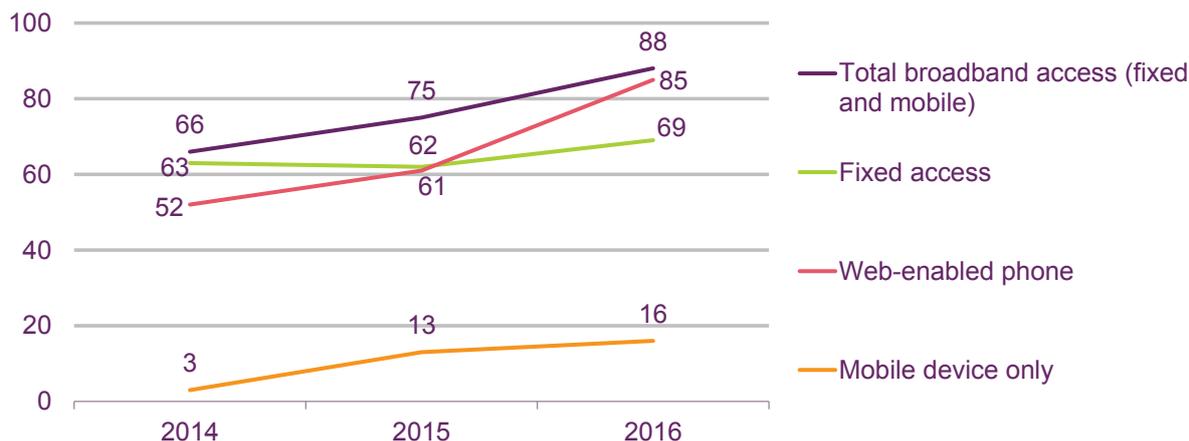
Ofcom's *Technology Tracker* shows that the percentage of the UK population with fixed broadband is 81%, this rises to 86% when web enabled mobile devices are taken into account.

In contrast, the percentage of Glaswegians living in households with fixed broadband (excluding mobile devices) is 69%, or 88% if mobile devices are included. This compares to 62% and 75% in 2015. Take-up of fixed services has remained stable since 2014 after differences in the socio-economic profile of the sample are taken into consideration; the apparent differences are not statistically significant. The increase in access to broadband at home has been driven, as we said in our 2015 report, by the take-up of smartphones. Indeed, the take-up of web-enabled mobile phones has increased significantly, rising from 61% in 2015 to 85% in 2016.

⁴ The City of Glasgow is defined as the area under the control of Glasgow City Council.

⁵ In 2015, there was a methodology change. Although consumers were still asked about access to home internet, they were not asked whether that access was via broadband or another source. It was felt that this question added little value as almost everyone with home internet used broadband. A small proportion of the 2015/2016 sample (45 people) were asked if their home internet was via broadband, and all of these respondents stated that it was. The methodology employed by the BPS differs from Ofcom's *Technology Tracker*, in that quotas and question wordings are different. Therefore discrepancies between the BPS and Ofcom's quoted figures are likely.

Figure 1.16 Fixed and mobile broadband take-up in Glasgow: 2014-2016



Source: British Population Survey

Base: All adults 15+ (Glasgow 2016 – 250, Glasgow 2015 – 542, Glasgow 2014 - 1405)

Q: How do you access the internet – personal computer at home, via a mobile terminal, through a TV-set, through a games console?

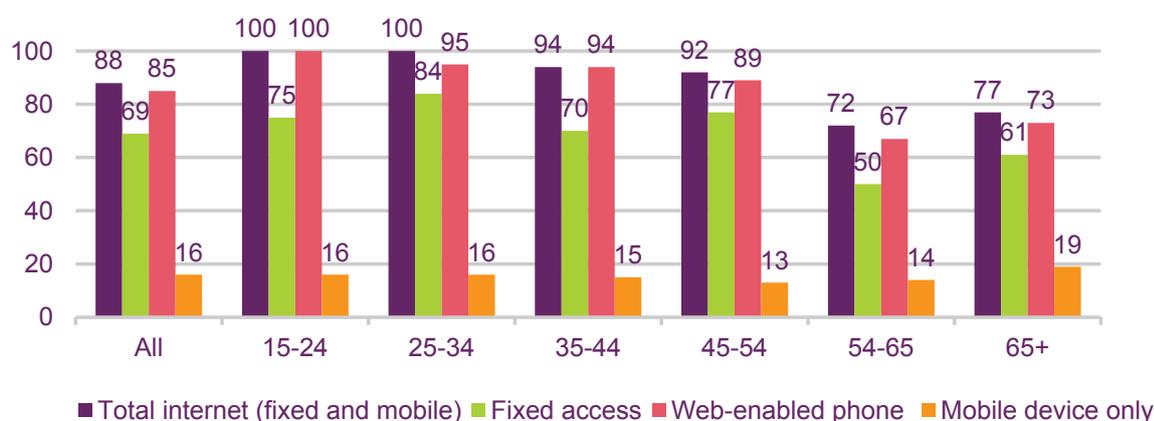
Q: Do you have a web-enabled phone?

A hundred per cent of 15-34 year olds in Glasgow have access to the internet

Almost nine in ten households (88%) in the Glasgow sample have access either to the internet at home or via a web-enabled mobile device. Access to a web-enabled device⁶ is highest among 15-34 year-olds, at 100%, and lowest among people aged 54-65, at 67%, as Figure 1.17 shows. Across Glasgow, 16% of respondents use *only* a mobile device to access the internet. This is most common among those aged 65+; one in five in this group only access the internet through a mobile device (19%); up from 9% in the same period in 2015.

There are no significant changes in the proportion of fixed-line home internet take-up among any socio-economic group. The only significant year-on-year change by age is a significant 25pp increase in the proportion of over-65s who have fixed internet, up from 36% to 61%.

Figure 1.17 Comparison of fixed and mobile broadband mobile take-up in Glasgow, by age



Source: British Population Survey

The percentage in brackets gives the percentage of all Glasgow respondents in that category.

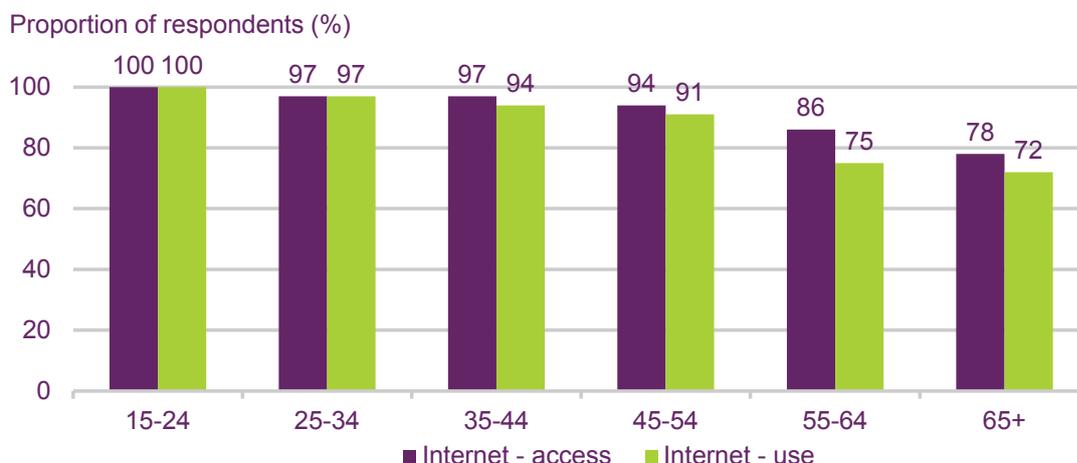
Base: All adults 15+ (Glasgow 2015 – 250) Q: How do you access the internet – personal computer at home, through a mobile terminal, via a TV set, through a games console? Q: Do you have a web-enabled phone? Q: Do you have a tablet?

⁶ A web-enabled device is a smartphone, tablet or a personal digital assistant (PDA). Access to such a device does not necessarily mean it is actually used to access the internet.

Almost all individuals under 45 have access to the internet *and* use it, both inside and outside the home

Across the sample, 96% of respondents in Glasgow who had access to the internet used it. Among under-55s, 98% of those with access used it, compared to those aged 55-64 and 65+, of whom 11% and 6% respectively had access but did not use it.

Figure 1.18 Internet access and use



Source: British Population Survey
 Base: All adults 15+ (Glasgow 2016 – 250)
 Q: How frequently do you use the internet?

Eight in ten under-55s in Glasgow who have access to the internet on a mobile device use it

Many consumers in Glasgow have access to mobile devices that could be used to access the internet, but they choose not to do this. As Figure 1.19 shows, 96% of those under 55, and 71% aged over 55, have a smartphone. However, just 38% of those with access over-55s actually use their web-enabled device to go online, while 78% of under-55s do so.

Figure 1.19 Access to and use of web-enabled mobile devices, by age

Age band	Access to web-enabled mobile device	Use of web-enabled mobile device	Percentage of those with access who use
15-24	100%	78%	78%
25-34	95%	79%	83%
35-44	94%	67%	71%
45-54	89%	60%	67%
55-64	67%	31%	46%
65+	73%	25%	34%
Net: Under 55	94%	75%	78%
Net: 55+	71%	27%	38%

Source: British Population Survey
 Base: All adults 15+ (Glasgow 2016 – 250) Q: Do you have a web-enabled phone? Q: Do you have access to a tablet? Q: Do you access the internet via a mobile terminal?